

# *Action Agenda*



## RECOMMENDATIONS

*of the*

## GROWTH MANAGEMENT ADVISORY WORK GROUP

*to the*

## MONTGOMERY COUNTY PLANNING BOARD

May 1991

# Growth Management Advisory Work Group Members

Barbara Steckel, Chair

Jennifer Baron

Lawrence Chan

Amy Federman

Larry Gordon

Michael Gravitz

Helene Jennings

Patricia Johnson

Robert Mitchell

Jack Neumann

Philip Perrine

Sue Ann Reed

Anthony Robinson

Jonathan Silber

Richard Strombotne

Several staff members of the Planning Department aided the Work Group: Melissa Banach, Robert Winick, Patrick Hare, Norah Bland, and Caroline Honig.

Staff and officials of several agencies of the County, cities, State, and neighboring jurisdictions were resources to the Group. They are listed below.

Raymond Ambrose, Baltimore-Washington Chamber of Commerce

Jack Anderson, Baltimore Regional Council of Governments

Carl Balser, Howard County Planning Department

Ted Blitgen, City of Gaithersburg

John Clark, Montgomery County Department of Transportation

Yolande Langbehn, Commissioner, Rockville Planning Commission

Vivian Marsh, Maryland Office of Planning

Kathy Mitchell, Montgomery County Office of Economic Development

Hal Phipps, Montgomery County Office of Planning Policies

Meg Reisett, Montgomery County Office of Planning Policies

# TABLE OF CONTENTS

Introduction .....	1
Background .....	1
Report Structure .....	3
 I. Framework for Growth .....	4
Introduction .....	4
A. The General Plan .....	4
B. Regional Planning .....	6
C. Maryland State Land Use Planning .....	6
 II. The Community .....	8
Introduction .....	8
A. Housing Stock .....	8
B. Fostering a Sense of Community .....	9
 III. Components of Growth .....	11
Introduction .....	11
A. The J/H Ratio .....	11
B. Determining Balance .....	12
 IV. Understanding Constraints to Growth .....	13
Introduction .....	13
A. Transportation Demand .....	13
B. Environmental Consideration .....	14
C. Education .....	14
 V. Economics of Growth .....	15
Introduction .....	15
A. Sustaining Growth .....	15
B. Costs of Growth .....	15
C. Business Cycles .....	16
 VI. Growth Management Tools .....	17
Introduction .....	17
A. Evaluation of Existing Tools .....	17
B. Proposals for New Tools and Application Methodologies .....	17
 Appendix. Additional Items Considered by the Work Group .....	18

# INTRODUCTION

The Growth Management Advisory Work Group (the "Work Group") was formed to examine the process of managing growth in Montgomery County aimed at the application of the planning process in the future. The results are provided as guidance to the Montgomery County Planning Board in the formulation of its long-range work program. For the Work Group, this involved the identification of priority issues and goals, and the targeting of topics of study and work necessary to continue sound planning. The Work Group recognizes that Montgomery County has developed carefully considered planning policies and a thorough growth management system. The Work Group was concerned specifically with discovering ways the processes could be made even more effective.

The Work Group has:

- reaffirmed support for a strong planning process based on the General Plan concepts and the Master Plans; based on use of management tools, with healthy and open participation in the process by government, business and residents;
- recognized and identified past planning assumptions that have changed in unanticipated ways, resulting in different patterns of development than expected;
- identified vital growth management tools and procedures that should be updated, refined, and, where possible, simplified for successful management of growth integration in the County; and
- developed recommendations and established priorities among them for consideration by the Montgomery County Planning Board to improve the integration of future development with the existing development of the County.

## Background

The 15-member Work Group was composed of County residents with a diversity of

backgrounds and interests, including architecture, business, civic involvement, education, finance, home building, law, and planning.

The term "growth management" was a topic of discussion. Growth management deals with the location, mix, density, and timing of land development. Some members felt restricted by the word "management" and preferred the word "accommodation." Others were concerned that "growth accommodation" would mean New York City skyscrapers mushrooming throughout the County. Perhaps a better word than either one is "integration," for it implies blending, harmonizing, or synthesizing. When we speak of planning and its function, we are really talking about an orderly system by which the new is integrated with the existing.

Without the provision to build a house or create a job, none of us would be living in the County. That house and that job mean a change in the status quo, so growth is inexorably linked to change. Montgomery County is dynamic and always evolving, just as the people who live here are. One person stated the reality very succinctly, saying "growth is us."

Early meetings of the Work Group centered around concerns and questions members had about the way the County functions and the perceivable results of change in the County. Through a series of more than a dozen meetings, we developed and carefully refined our thinking about the issues confronting the County.

Aspects of both the Annual Growth Policy and the Adequate Public Facilities Ordinance raised questions. Prolonged moratoria on new subdivision approvals are of concern. Is congestion made worse by moratoria? Have the effects of moratoria been studied? Why does the County seem not to be accountable for providing needed infrastructure? Why are special ceiling allocations allowed in areas already deemed overburdened? Once a project is in the Capital

Improvements Program (the "CIP"), is it too easy to remove or delay it? Has the CIP been trivialized by yearly examination? Would less frequent examination make it more binding in any respect? In terms of infrastructure, we must consider more than transportation; schools, police and fire stations, and sewer and water capacity are also infrastructure needs. There are other considerations, too, such as parks and libraries. In discussing moratoria, Work Group consensus did not advocate lifting moratoria without providing infrastructure.

The continuing economic vitality of the County is important; and this requires economic growth, not just development. Also, what level of growth can be financially sustained? The jobs/housing ratio seems to be a key indicator. Is it the best mechanism? If so, is 1.5 really the best balance? What do we really mean by "balance?" Is sufficient attention being given to demographics?

Although the County has the General Plan, Master Plans, zoning and subdivision ordinances, and many other tools, those tools don't always ensure that what was envisioned is achieved. The County should be creating a more livable human environment. Fostering neighborhood identity and a sense of community can be done in a variety of ways and should be encouraged. Trees and open green space are also necessary to people's feeling of well-being. Such things as this often influence reaction to development. People sometimes react negatively to change because it appears to be a diminishing of the community. Appreciable "perks" or increases in quality of life make a perceptible difference. Small parks in areas of high density are as important as the larger parks and the open space of the Agricultural Reserve. New buildings do not have to appear bleak and inhospitable. Civic space should be created with careful thought to aesthetics and with more appeal.

Education and communication are also important aspects of the growth management process. Master Plans and the planning process need to be accessible to residents. However, residents and property owners

have a responsibility to participate in the process. Too often, people seem offended by a vacant field sprouting a building. Or, moving near a Metro station, they seem surprised at the density of the land use that develops. Greater public knowledge and understanding of planning is needed.

The Group examined transportation issues and debated the relative roles of the automobile and mass transit and their relationship to growth management. Is the automobile paying its way? What is the realistic ridership of transit services? What is the reliability of Transportation Demand Management and what are its effects? How well are residents' needs being met by existing and planned transit services? Does convenient, fast, and inexpensive transit exist to take residents to their destinations? One problem is the north-south orientation of transit. People don't just go from home to work and back; en route destinations, such as child-care and errands are significant in today's lifestyles.

An adequate local, County-wide, and regional transportation network should be planned and implemented. The General Plan emphasized a radial transportation system assuming that Washington, D.C., would continue to serve as the major hub of jobs and businesses. The reality is that employment and business centers have dispersed into nearby regions, including Montgomery County, to a much greater degree than was forecast in the 1960s. Intra-county and inter-county travel were generally envisioned in the General Plan, but now necessitate greater emphasis in light of the way the County and other jurisdictions are developing.

The *General Plan Assessment Study* determined that planned transportation is inadequate for projected build-out. Both the Assessment Study and the *Comprehensive Growth Policy Study* stressed the need to address the jobs/housing ratio. Additionally, there is need to assess the compatibility and the compliance of the Master Plans with the General Plan, particularly with regard to whether all of the amendments to the General

Plan over the past 25 years have had the effect of altering the Plan in some overall manner.

The General Plan has served the County well. Its vision of development interspersed with green space remains sound.

Montgomery County has developed a comprehensive planning system that has generally provided the structure needed for the orderly integration of growth and development. Examination and refinement of the General Plan, the planning process, and growth management tools seem to be appropriate.

To some extent, the direction of the County has been documented by the *General Plan Assessment Study* and by the *Comprehensive Growth Policy Study*. Additional work is necessary to achieve better growth integration.

## Report Structure

All these points coalesced into six areas of recommendations: the Framework for Growth, the Community, Components of Growth, Constraints to Growth, the Economics of Growth, and Growth Management Tools.

Within each of the six sections of the report, the Work Group presents specific recommendations. The order of the recommendations in each section corresponds to their importance as established by Work Group vote. While the Work Group considers each of the six sections important and has not attempted to rank the order of the sections, it is generally agreed that the first section is the most important. The sections are then presented in an order that the Work Group believed would promote a logical flow of thought and analysis. Work Group discussions following the recommendations are included to amplify the recommendations in light of the Group's thoughts on the particular subject. While most of the recommendations imply studies by the Planning Board, there are some that should be addressed by other agencies.

The Growth Management Advisory Work Group hereby presents its findings.

# I. FRAMEWORK FOR GROWTH

## INTRODUCTION

The framework for the development of Montgomery County is ...*On Wedges and Corridors, a General Plan for the Maryland-Washington Regional District* (the "General Plan"), formulated in the 1960s. The Plan envisioned development concentrated in radial corridors, with green wedges of open space between them. Although the General Plan called for the development of employment centers in the corridors, it retained the vision of Washington as the primary focus of employment. A central feature of the Plan is its presumption of Washington as the hub of the radial spokes, or corridors. The transportation network, including transit, is also predicated on this presumption although the Plan recognized some need for cross-County movement.

Several key assumptions of this Plan have changed over time. Montgomery County itself has become a major employment center. Transportation patterns have developed in ways that were not anticipated. Today, nearly 60% of the County's resident workers work within the County. Other counties throughout the Baltimore-Washington region also have, or plan to develop, significant employment centers. This dispersal of employment centers into the counties in Maryland and Virginia creates a greater need for a regional approach to appropriate planning for land use, transportation networks, and environmental protection.

The State of Maryland's recent proposal for State planning legislation (the "2020 Legislation") is a recognition of the fact that the planning for growth, including the supporting infrastructure, the protection of natural resources, and economic viability, involves more than a single local jurisdiction.

These influences establish a need for Montgomery County to examine its current position, its direction, and its role in the region.

## ACTIONS

### A. The General Plan

**Investigate the need to refine the General Plan or modify its goals and objectives.**

**Evaluate the degree to which the General Plan has successfully accommodated actual growth and how successfully it can be expected to accommodate future growth, both economic and physical.**

**Define necessary changes, if any; and assess their effects, accounting for current and future needs, including the transportation network and environmental considerations.**

The Work Group believes that the General Plan's fundamental principles of concentrating development in mixed-use centers

along transit corridors, interspersed with wedges of open space, remain valid. There is, however, a general feeling that some refinement is needed.

While the basic concepts of the General Plan have been followed, the County has developed in ways not envisioned by the Plan. The corridors have developed less intensely than projected, while the wedges have developed more intensely than projected. There are more in-commuting workers than expected. The Plan did not envision either the number of commuters or the dispersal of origins and destinations that exist today. The General Plan did not anticipate the extent of the need for both intra- and inter- County movement, perhaps, because it did not foresee major job centers other than downtown Washington.

The Work Group recommends the following major studies related to elements of the General Plan.

- **Measure the compliance between the General Plan and the Master Plans.**

This study is particularly important. The County may have arrived at a point where all the amendments to the General Plan over the past 25 years have had the effect of altering the Plan in some overall manner. Also, developing a mechanism to ensure that future Master Plans remain in line with the General Plan would be useful in preventing future development from straying from General Plan principles and goals.

- **Determine the probable future economic and land use roles Montgomery County will play relative to the region.**

The dynamics of the Washington-Baltimore region are constantly changing. Montgomery County has gone from being a suburban community of Washington to being a major location of employment. Patterns of growth adjacent to and beyond the borders of the County need to be addressed also. Other jurisdictions in Maryland currently plan major housing and employment centers of their own. How will all of these changes affect Montgomery County? The County needs to maintain economic vitality. How best to achieve this? This point really asks the question, "Where are we going?"

- **Continue to reassess the adequacy, compatibility, and effects of the planned transportation network, including both roads and transit.**

The transportation network envisioned by the General Plan has not been realized. The contemporary volume of cross-County and inter-county movement was not foreseen.

A better match between land use and transportation is necessary. The 1988 *General Plan Assessment Study* indicated that presently planned transportation facilities are inadequate for build-out of current zoning.

The Work Group emphasizes the terms "network" or "system" in discussing transportation. There are too many instances in which there is only one route or travel means that can be taken to reach a particular destination. In addition, the Work Group stresses the importance of a regional network.

- **Determine the role of the Route 29 area within the wedges and corridors framework and determine future development based on this analysis.**

The General Plan assumed that the eastern corridor was to be along I-95. The Route 29 area is not considered a corridor. The Work Group believes that there are several reasons why development along Route 29 has been more intense than envisioned by the General Plan.

First, the projected development along I-95 has proceeded very slowly. Much of it is merely in the planning stages even today. The Route 29 area seemed to fill a void in that region. Second, Route 29 became a major transportation corridor for jurisdictions to the north and to the east of Montgomery County, especially Columbia, as well as for Laurel and Baltimore.

Less expensive land and high density zoning (including TDRS) also contributed to the fact that, in both housing and jobs numbers, there is a greater intensity of development than was envisioned. Therefore, the role of Route 29 needs to be clarified. Both planners and citizens should be involved in this process.

- **Study and evaluate projected land use trends in the Agricultural Reserve.**



- **Review Transferable Development Rights Program.**

- Current public policy allows large-lot residential development, golf course development, and public facility use such as landfills and incinerators in the Agricultural Reserve. There is a concern that eventually there will be insufficient farming land left to maintain the viability of agricultural uses in the Agricultural Reserve. Some County residents are concerned that the Reserve is only being preserved until it is needed for future development, with even the possibility of placing a corridor city in the Reserve.

The long-term purposes of the Agricultural Reserve need either to be reaffirmed or reexamined and redefined. Such actions could have serious consequences for the Transfer of Development Rights (the "TDR") program. Current public policy dictates that some areas of the County accept added density in order to preserve farmland that might otherwise fast disappear. If that purpose were no longer sound, the role of TDRs could be in question.

An attempt should be made to offset the additional density from TDRs by creating small parks within TDR receiving areas. People in TDR receiving areas may benefit only marginally from the Agricultural Reserve, partially because of distance. This causes a disparity or inequity in the system.

A study could also investigate the possibility of providing additional receiving areas dispersed in transit-serviceable locations, especially those down-County.

- **Study alternative methods to provide additional active and passive open space in all areas of intense development.**

Intense development should not preclude green space.

Small parks and other opportunities for open space are vital to the health of a

community, especially in areas of intense development.

## **B. Regional Planning**

**Actively pursue a systematic County policy to foster regional cooperation in planning, not only with other members of Washington Council of Governments, but also with members of the Baltimore Regional Council of Governments.**

**Investigate ways to promote enforceable regional planning.**

While continued participation by the County in the Metropolitan Washington Council of Governments ("COG") is of great importance, other counties in Maryland are assuming roles with equal significance. Montgomery County needs to look beyond Washington COG and develop cooperative ties to other Maryland jurisdictions. Their land use directly impacts the County today, and that impact may well increase in the future.

Various means need to be investigated to foster and encourage dialogue among various planning boards and staffs in neighboring Maryland counties and jurisdictions. Such means might include establishing a "newsletter" of current and future areas of work, including new ordinances, moratorium areas, and other changes which may affect other jurisdictions, and encouraging other jurisdictions to do the same.

Greater consideration should be given to data and assumptions beyond the borders of the County in transportation and land use planning and in demographic forecasting. For instance, the volume and destinations of in-commuting or pass-through traffic in Montgomery County affects our transportation system. Regional incoming traffic is especially critical in "border" areas. Further, major new development in adjacent areas should be taken into consideration in our planning activities. Investigate ways to im-

prove and strengthen the County's techniques and methods in these areas.

### **C. Maryland State Land Use Planning**

**Identify issues in State land use planning legislation that affect County planning processes and the County's land use plans as set out in the General Plan and the Master Plans, so that the County can be instrumental in the crafting of an appropriate State program.**

There is some uncertainty about current proposals for State planning legislation. Concerns center around the possibility of conflict between General Plan concepts and State legislation, the role of local government versus the State in the planning process and the allocation of funding. Additionally, if the State took the dominant role in planning, there is concern that some County programs and principles might be undermined, particularly where the County desired higher standards than the State allowed.

Montgomery County takes sound planning principles seriously. The County has one of the oldest and most comprehensive set of planning policies in the State. Montgomery County's history of sound land use planning makes it a natural choice for a leadership role in the formulation of any State legislation.

## II. THE COMMUNITY

### INTRODUCTION

The examination of the General Plan and other related studies has as a basis the broad overview of County planning and the integration of elements within the process. For many, though, the focus of interest is more immediate, more tangible: the impact on one's "community." Without precise political boundaries, the 495 square miles of land in Montgomery County are broken into communities through historic patterns and people's perceptions. Many people feel, or wish to feel, part of a neighborhood. In turn, these smaller entities of neighborhoods or subdivisions may be linked together to form a municipality, town, or some other area that gives a "sense of place." In assessing future planning needs for Montgomery County, this point clearly warrants our attention.

The Work Group made recommendations about two aspects of the development of communities. The first relates to their basic building blocks, housing, and the second proposes approaches to help foster a sense of community. The overall objectives in the Work Group's suggestions for the housing stock are to improve flexibility in the housing supply and to provide a wider range of housing choices. To this end we discuss studies that would consider programs for existing housing, the creation of new housing, and the factors that affect cost in an attempt to moderate current costs of shelter. In proposing two studies related to nurturing a sense of community, we hope that additional ways can be found for the planning process to contribute to the enhancement of existing and new communities.

### ACTIONS

#### A. Housing Stock

**Study the effects of the lengthy development approval process on the cost and availability of housing, office and retail space. Analyze ways to lower costs of housing within Montgomery County, especially costs associated with local building, development, and zoning code regulations and permitting processes.**

**Explore potential zoning and subdivision ordinance changes to encourage a wider range of new housing alternatives.**

The Work Group recognizes the public interest in providing housing at moderate cost and in response to demographic changes that foster the need for more housing options. Therefore, we recommend that the processes involved in new construction (primarily housing, but also related to office and retail) be

analyzed in detail. The objective would be to evaluate whether there are standards and procedures that add to the associated costs but are not directly linked to health and safety, with the objective of streamlining the process and thereby, reducing costs. Similarly, a study should consider the modifications that might take place in the zoning and subdivision regulations in order to promote the production of a broader range of housing choices.

**Explore additional approaches to incorporation of housing in mixed-use development to create true communities, to provide additional housing (especially at lower cost), and to use infrastructure more efficiently.**

In the development of mixed-use zones, particularly near transit stations or as part of transit-serviceable centers, the Work Group suggests additional study of the incorporation of various forms of housing into the design in

order to maximize the amount of housing provided in such a setting and to ensure its attractiveness as a residential option.

**Study and implement mechanisms to encourage more efficient use of existing housing stock. Consider removing impediments to alternate uses of existing housing.**

Changing demographics such as smaller household size, the baby boom, and a significant increase in empty-nesters and elderly, as well as the County's interest in securing more affordable housing, are the basis of the recommendation to consider more efficient use of housing stock. Areas to be explored should include educating the public, developing new housing types, and providing County assistance in marketing and financing information. Housing should be flexible in order to respond to change in lifestyles and also to encourage continued use of existing infrastructure (roads, schools, etc.). Current restrictions limit some options such as the expansion of accessory apartments, but the impact of modifying those restrictions should be analyzed and considered.

## **B. Fostering a Sense of Community**

**Explore ways to make the scale, density, and diversity of new development more compatible with its location and surroundings and, where high density is planned, study ways to make it more appealing and attractive to the community.**

As recent development has produced new subdivisions that are different in appearance and density from the surrounding community, there is a need for better strategies and designs to promote compatibility of the new with what is in place. Existing residents react to growth that they perceive to be disharmonious or out of sync with the established surroundings. A study is recommended to produce suggestions or models to provide better accommodation be-

tween new types of development (especially those of higher density) and their adjoining communities. Particular attention should be given to the visual aspects, changes in traffic patterns, amenities that could benefit the existing community, and transition designs for the "edge" where the old and new meet. While such compatibility issues are often dealt with on a case by case basis by the Planning Board, a review of the issue generically might provide developers and planners with additional suggestions and would provide for more consistency in handling the incorporation of new communities.

**Identify the elements that make for a sense of community that can be implemented in existing and new neighborhoods. Make recommendations for the centralized location of community facilities (libraries, schools, etc.) and other enhancements that help to define and create neighborhoods.**

Within the vast geography of Montgomery County, there are areas that have successfully achieved a community identity and there are other sections that are eager to acquire a sense of community. This focus on creating, protecting, or enhancing a neighborhood feeling, a sense of belonging to your immediate community, affects both existing and new communities. This study is proposed to expand on the thinking of the Commission on the Future and of the Montgomery County Planning Department's Pedestrian Neighborhood Study to identify the constituent elements that lead to a sense of community and to begin their inclusion in the Master Plan process and other public policies.

The Work Group proposes a survey of residents in different neighborhoods to help determine quantitatively, as well as qualitatively, the ingredients that contribute to neighborhood identity. Areas that warrant investigation include physical aspects such as the streetscape, small parks, bike paths, landscaping, siting of schools and meeting

facilities (the “magnet centers” of the Commission on the Future), sidewalks, parking, traffic patterns, neighborhood shops and services, and transit accessibility. The Work Group also suggests considering more intangible elements that might promote a sense of place — developing an historic identity or visual theme, preserving and recognizing local area names, facilitating communications within a neighborhood, and so forth.

### III. COMPONENTS OF GROWTH

#### INTRODUCTION

Fundamental to County planning is the concept, established in the 1964 General Plan, of providing a balance of housing and employment opportunities within the County. This balance has more recently been reduced to a quantitative measurement, referred to as the Jobs/Housing (J/H) ratio. This precise measurement has evolved as a descriptive measure related to County-wide planning and as a proposed regulatory tool to be made part of the Annual Growth Policy.

Conditions in the County and adjacent Washington and Baltimore metropolitan areas have changed materially since 1964, both metropolitan areas having grown in population and economic importance. The focus of residents' places of employment, travel destinations and frequency of travel; their household size, mix, and location; and services they export and require have shifted considerably. The County has evolved as a regional economic center with smaller, growing job centers within the County.

Changing demographics is another factor affecting the balance among growth components. Projections show a sizable increase in the number of school-age children over the next 15 years. Other trends, such as changes in resident workers per household, household size, and age distribution, should be identified and correlated with trends such as vehicle miles of travel per capita to gain a better understanding of the effect of growth and change on the jobs/housing balance.

The Work Group believes it is appropriate to analyze the efficacy of the J/H ratio as both a measurement and a growth management tool to determine: 1) whether the J/H ratio is the appropriate measurement or whether other components of growth should be considered; 2) whether the appropriate measure of components of growth should be utilized as a planning or a regulatory device; and 3) over what period of time and geographic area a balance should be applied.

#### ACTIONS

##### A. J/H Ratio

**Evaluate the goals, appropriateness, interim consequences, effectiveness, and short- and long-term consequences of a policy aimed at balancing the Jobs/Housing ratio as a method for managing growth and economic development.**

The County government should articulate the goals underlying the policy of seeking to achieve a balance in the J/H ratio. The context of its use implies that it is intended to achieve a balance of one job within the County per worker residing in the County. The Work Group further assumes that, if this balance is achieved, there will be a reduction in in-commuting and out-commuting, which will result in less traffic congestion and reduced transportation expenditures.

We believe a study should investigate the assumptions associated with the balanced J/H ratio line of reasoning. Other measures and other components of growth than jobs and housing should be studied to determine whether it is possible to measure more directly the desired goal of balanced development. One possible measurement, mentioned here only as an example and not with the intention of limiting the analysis, is the ratio of jobs per resident worker (J/RW). Many other factors and relationships may be valid for this analysis. In this example, if the County achieves a balanced J/RW ratio, it does not necessarily follow that a County job is filled by someone who is able to afford housing within the County and become a resident worker. The goal of reducing in-commuting by balancing jobs and resident workers is

diminished by the degree to which County wage and salary levels are not sufficient to match County housing prices. Similarly, a County resident may not find appropriate employment within the County.

Other issues related to the goal of a balanced J/H ratio requiring study include analyzing the portion of jobs within close proximity to transit as well as housing within close proximity to transit. Assuming achievement of a J/H balance, lessening traffic congestion may or may not result, depending on the degree to which resident workers have alternate forms of transportation at their disposal to travel to County jobs.

County-wide J/H ratio just because a particular Master Plan revision is underway. Rather, Master Plan jobs and housing goals should be based on the geographic location of the planning area within the County and other planning considerations.

## **B. Determining Balance**

**Determine how balance among the components of growth should be achieved and the appropriate time frame and geographic area(s) over which to achieve such a balance.**

Study whether a goal of a particular balance should be established and the balance regulated on an annual County-wide basis, or whether the balance is better addressed during Master and Sector Plan revisions. Factors such as the variance of resident workers per household due to the local economy and, similarly, the variances of jobs per square foot of office space should be investigated to help determine the proper time frame for achieving the appropriate balance.

The study should also include determining the appropriate geographic area over which to achieve a specific balance. At one extreme, providing jobs down-County and housing up-County doesn't reduce congestion even though the J/H ratio is balanced County-wide. On the other hand, attempting to achieve a balance of jobs and housing within each planning area may be impossible or have no impact on traffic congestion.

This study should also investigate the appropriate manner of preparing jobs and housing goals for Master Plan areas. Such goals should not be established to help achieve a

## **IV. UNDERSTANDING CONSTRAINTS TO GROWTH**

### **INTRODUCTION**

Various legal, economic, fiscal, environmental, geographic, and behavioral/societal factors may act as constraints on the total amount and types of growth possible in Montgomery County. At present, one of the greatest constraints to growth is the inability of the transportation system to serve the ever-increasing numbers of commuters. Recognition of the need to protect the quality of our water, air, wetlands, trees, and other natural resources has led to the adoption of environmental protection laws and regulations; these create significant environmental constraints. Other constraints come from residents of the County who find it difficult to adjust to change; they often resist new development and sometimes resist the public facilities needed to serve growth.

### **ACTIONS**

#### **A. Transportation Demand**

**Study additional creative ways to reduce traffic in different types of planning areas. Evaluate the degree to which transportation demand management can reduce congestion and increase cost-effectiveness of all types of transportation spending.**

Planners should pursue an increased understanding of travel in the County, evaluate effectiveness of traffic alleviation measures being used and study any additional methods that might be used. The *Comprehensive Growth Policy Study* showed that reduction of single-occupant auto travel is critical. Traffic alleviation measures have been studied and a number are now being implemented in Montgomery County. Tailoring traffic mitigation programs more directly to specific geographic areas might be more effective. More of such programs might reduce the need for some new roads. The effectiveness of disincentives to single-occupant auto use and of incentives for carpooling and use of various public transportation modes should be determined.

**Identify, reserve and establish priorities for funding new rights-of-way for highways, transitways, high-occupan-**

**cy vehicle facilities, and other public rights-of-way in advance of development.**

Careful planning and decision-making must now take place to create a realistic, integrated transportation plan that will adequately support our up-to-date land use plan. Work is now in progress to plan new rights-of-way for transit and High Occupancy Vehicle ("HOV") facilities and should be expanded to include other transportation facilities.

**Study changing travel patterns and travel behavior to determine 1) the portion of congestion due to population growth and the portion due to changing behavior and travel preferences, and 2) how land use and transportation planning decisions are affected by changing travel patterns.**

**Develop a better understanding of people's real preferences with regard to transit alternatives to assist in deciding the types of transportation facilities that should be built and where.**

It is reasonable to assume that some of the traffic congestion is due to more two-worker families, more autos, child care travel, and other behavioral changes. Understanding the degree to which these factors cause congestion might assist in transportation planning. Any consideration of con-



structing new transit facilities will require estimating potential ridership. What economic and behavioral factors affect travel choices made by Montgomery County residents? Specialized surveys should help determine such information as: what incentives or conveniences would persuade people who ride bikes for recreation to ride them to work, and how much money a family would have to save — in reduced rent for parking, for instance, as well as reduced car expenses — to be willing to give up their second car.

## **B. Environmental Considerations**

**Examine the constraints on the level, location and costs of growth created by environmental laws and regulations, both State and federal, including the Clean Air Act, the Clean Water Act, stormwater management, wetlands regulations, and reforestation proposals.**

It is likely that more stringent current and future environmental protection laws and regulations could materially affect where development occurs and its costs. They could severely restrict where the County can build roads, transitways, water and sewer lines and other public facilities needed to serve growth. County officials need to understand these constraints thoroughly and plan accordingly to achieve and maintain environmental objectives while also providing for planned growth.

## **C. Education**

**Promote the education of residents and businesses as to the origins of growth and growth management issues and resultant demographic, fiscal, and environmental changes to alleviate some of the emotional impact of growth.**

One impediment to the proper management of growth is residents' concern about and resistance to change relating to their environment; i.e.: new roads, new housing

developments, new people moving in. Many people are unaware of the realities of our County — that it will change because it is a desirable place to live and do business. The adjustment might be eased with understanding of

- legal constraints on government regulation of property owners' rights to develop,
- the inevitability of growth and changing demographics, and
- various causes of traffic congestion.

The Work Group discussed possible use of videos to promote such understanding and also expanded access to planning information through alternative locations such as libraries.

## **V. ECONOMICS OF GROWTH**

### **INTRODUCTION**

Montgomery County is a dynamic regional economic center adjacent to the nation's capital. It has sought to provide its residents with a nationally-recognized education system and progressive governance. As a consequence, it has attracted and continues to attract a broad population mix.

The County has been able to accommodate its growth resulting from both natural population growth and in-migration. It has also been able to afford the consequent increases in related costs, despite, or perhaps because of, changing regional economics. However, as the relative importance of surrounding jurisdictions changes to complement or compete with the County, the County must determine the fundamental components of the economic engine that generates growth, identify all direct and indirect costs that are consequences of growth, and learn how to anticipate the costs, pay them, and control their impacts.

Some of the County's capital infrastructure is approaching the end of its functional life. Major capital expenditures for repair and replacement should be expected in the near future. This requirement must be balanced with the need to fund expansion.

### **ACTIONS**

#### **A. Sustaining Growth**

**Determine the level and pattern(s) of growth that are financially sustainable by either a) determining a level of spending sustainable over a projected time period and the variable proportions of jobs, housing or other relevant criteria that will support such spending, or b) projecting various levels of growth and then projecting the cost(s) of supporting such levels.**

Many factors influence the pace, direction and parameters of growth, here defined to encompass both economic expansion and the dimensions of physical growth in geography and capital infrastructure. Economic, political and environmental factors will determine and control the desired level of growth. The question of funding the costs of such growth is a critical element in these determinations.

The County is anticipating major growth from internal factors and from in-migration. This growth will affect County services, infrastructure, demographics, and economics in ways that will be difficult to anticipate. The

County must determine how the factors that contribute to the inevitable growth will be managed and directed, and how the costs will be funded, for the maximum benefit and minimum detriment.

#### **B. Costs of Growth**

**Determine the costs of growth compared with the costs attributable to changes in living patterns; consider whether and to what extent these findings imply a need for changes in tax and user fee structure.**

Population growth will be a natural result of both increases in the present population of the County and in-migration. This growth will place demands on and create costs for such services and infrastructure as schools, roads, social services, waste management, and recreational facilities in demographically predictable ways.

Less determinable or predictable are the costs that result from changing living styles and patterns. At issue are whether two-worker families will maintain two cars, or more as children enter high school; whether

residents will drive more miles as economic centers develop and evolve; the extent to which these changes will affect air quality; and the need for and location of public transportation and other facilities. Moreover, as the County population ages, changing demographics may require the County to provide new or different services and facilities and change the mix of facilities and services now provided. The County must continually reevaluate the optimum method of delivery of such services.

A major issue is the extent to which the current tax structure will affect these projections. The County should consider the mix of income, property, sales, and excise taxes and project the effect of changes in their relative burden and efficacy to produce the desired policy goals as the demographics of the County change. The tax structure can be an important policy tool to promote the goals that will be established.

**Determine whether and to what extent public costs of growth accommodation are a function of patterns of development.**

Patterns of growth and development have evolved that were not foreseen by the General Plan, particularly the development of major employment centers in the County and east-west and inter- and intra-county commuter routes rivaling the traditional radial hub and spoke pattern upon which the General Plan was based. Moreover, the popular belief that sprawl is more expensive than concentrated development has recently been questioned; yet that belief underlies much of the County's efforts to manage growth.

## **C. Business Cycles**

**Investigate the feasibility of implementing a counter-cyclical revenue or expenditure program or reserve fund to provide funds for the County to continue**

**capital improvement projects during recessionary periods.**

The Work Group believes that the concept of growth management includes mitigating the adverse effects of growth not only by intelligent, regular and consistent management of the factors causing growth, but also by dealing with the equally pernicious effects of a lack of growth on the local economy. The County should consider ways that planning regulations can be modified or new tools developed that would tend to stimulate development during times when the economy is depressed or quiescent. A source of funding that could enable the County to continue to discharge its commitments during these periods may be of benefit to the community. Funding could come from a combination of various sources, including private industry or even sequesters of small percentages of the annual capital budget to provide for such future funding.

During recessionary times, planned capital improvements may be delayed or canceled. However, private projects may have been undertaken and funds committed on the basis of the proposed capital construction. The delay or termination of those capital projects may cause termination of the affected private projects and the loss of jobs; it may also have long-term consequences adverse to the banks, contractors, and construction firms involved.

## **VI. GROWTH MANAGEMENT TOOLS**

### **INTRODUCTION**

The County has an enviable record of visionary growth management. However, the Work Group believes market forces and the County's regulatory reaction thereto have caused much of the County's growth to be significantly different than was projected when many of those growth management tools were first formulated and implemented. Therefore, the Work Group proposes the studies and actions enumerated below.

### **ACTIONS**

#### **A. Evaluation of Existing Tools**

**Analyze existing County growth management tools and techniques to assess their individual and collective effectiveness.**

**Assess the effects of long-standing moratoria, such as increased land costs and development costs, decreased affordability of housing, and possible distortion of the development pattern.**

The County's current growth management tools include such items as the Annual Growth Policy, Adequate Public Facilities Ordinance, Capital Improvements Program, Ten Year Water and Sewer Plan, and resulting moratoria. The Work Group recommends an evaluation of whether the growth management tools being applied in the County are effective in accomplishing the desired objectives. Inventory the type and amount of regulation that has occurred. The Annual Growth Policy (the "AGP") should discuss the history of the moratorium status of an area. Also, the AGP should specify those Capital Improvements Program ("CIP") and related projects needed to curtail individual moratorium conditions.

**Determine the local and County-wide costs incurred when construction of Capital Improvements Program facilities is postponed or canceled.**

The Work Group is concerned with the impacts of delays and/or cancellations of projects on policy areas where development

projects have been approved. We strongly recommend that the County consider approaches to stabilize CIP project schedules and minimize changes in CIP projects. This issue is more problematic in the case of State-funded projects.

#### **B. Proposals for New Tools and Application Methodologies**

**Study growth management tools and techniques employed by other jurisdictions to determine their suitability for Montgomery County.**

**Explore ways to promote consistency among the County and cities of Rockville and Gaithersburg in growth management goals, tools, and implementation techniques.**

**Identify and resolve inconsistencies of application among all County agencies that administer growth management tools.**

To maximize their effectiveness, growth management tools must be consistently applied. Such consistent application should occur throughout all jurisdictions and agencies in the County. Moreover, consistent application will enable the County to make the most accurate measure of effectiveness, reduce duplication of effort, and promote fairness and confidence in the growth management program. It will also enhance the level of certainty associated with such programs, which is of particular import during periods of economic downturn.

## **Additional Items Considered by the Work Group**

These are actions that the Work Group considered to have merit, but that rank lower in importance than those in the body of the text.

Study alternative lifecycle communities/housing to give different age groups choices of housing and to mix ages within neighborhoods.

Determine appropriate and desirable (for each community) mix and scale of neighborhood residential/commercial development to ensure economic viability and community acceptance, such as home occupations, small businesses, and neighborhood convenience stores.

Determine how much development around a transit stop can be accommodated and how much of this development transit can realistically serve.

Is it advisable from a public interest and/or a public policy perspective to designate transit nodes — Metro stations — in the County with levels of service ("LOS") for traffic which are substantially below LOS for surrounding policy areas? In other words, what are the public and private costs and benefits and land-use impacts of carrying out the policy of "Where transit opportunities are good, we can allow more congestion on the roads"?

Experiment with different types of educational campaigns to better understand which approaches would be most influential in positively affecting citizens' perceptions of the nature of growth and the impacts of growth management.

Educate the public on the costs of the private automobile to both the public sector and to individuals compared with the costs of alternative means of transportation.

Encourage the use of prefabricated or portable school core facilities (i.e. gym, cafeteria, library, labs) to adapt to constantly changing demand for schools within different locales in a timely manner and as a way to reduce capital costs of school construction and school reuse.

Consider entering into agreements whereby developers can provide or fund infrastructure improvements in advance in exchange for vesting of development rights at an earlier stage in the development process.

